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ABSTRACT

This report provides an overview of the challenges facing the University of Maryland System (UMS) institutions in the coming years and of strategic planning efforts that administrators and faculty must take to meet these challenges. By the year 2002, UMS will need to increase enrollment by 20 percent, increase productivity by 20 percent, and generate a 20 percent net increase in income from sources other than government funds and student tuition. UMS institutions will need to build on institutional strengths, identifying particular strengths on which they plan to build to position themselves strategically for the 21st century and to enhance the quality of their services. They will need to strengthen institutional collaboration to expand educational opportunities, reduce unproductive duplication, and achieve economies of scale that institutions acting independently cannot match. They will also need to strengthen institutional revenues, especially from non-state sources and "paying customers" in the private sector. Finally, UMS institutions will need to strengthen information technology infrastructure to extend distance learning capabilities, expand access for place-bound students, and improve the efficiency and quality of both academic programs and administrative services. The expected outcomes of these initiatives for the UMS system and the state of Maryland are noted. (MDM)

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TOWARD A STATE OF LEARNING

(ACHIEVING THE VISION III)

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STRATEGIC PLANNING FOR THE UNIVERSITY OF MARYLAND SYSTEM

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That higher education will change in the next millennium is not in question.

What is in question is whether the impending changes will strengthen or weaken the academic community's role in society. The University of Maryland System intends to strengthen its role by taking control of change through bold and deliberate planning. Only through the strength of 13 distinctive institutions can the UMS fulfill its mandate to serve the advanced educational needs of Marylanders while achieving and sustaining national eminence.

Through a stronger UMS, the State of Maryland will gain strength economically, socially, culturally, and environmentally. Moreover, the citizens of Maryland will gain greater opportunities to strengthen their skills, talents, health and quality of life.

The key agents for positive change in the UMS will be the faculty. Therefore, it is from the faculty that this planning effort takes its overarching objective:

> **The University of Maryland System is a community of scholars dedicated to making Maryland a State of Learning.**

In the words of the Council of University System Faculty:

> *An integrated community of scholars incorporates the shared, personal participation of faculty and students in a process of exploration, questioning and reflection. Faculty and students are partners in learning. A University System structured as a community of scholars permits a diversity of viewpoints, encourages flexibility of curriculum models, invites a broader mix of teaching and learning strategies, and fosters greater use of information technology as an*

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educational tool. The result of these combined approaches is to develop greater cooperation within the System and to encourage creative learning partnerships with individuals and institutions in the larger community. As a community of scholars, the University of Maryland System can become a center of learning activity that offers the citizens of the State and its commercial, industrial, and public institutions an expanded choice of, and greater access to, first-quality educational services while recognizing its accountability to the public it serves.

STRONG CHALLENGES

By the year 2002, the UMS will face significant growth in enrollment demand from an increasingly diverse student population, heightened market competition from traditional and emerging educational enterprises, and tightened constraints on funding from governmental sources -- local, state and federal.

In order to meet the challenges of the 21st century, the UMS as a whole must pursue and attain the following goals:

- ⇧ **20% increase in enrollment (with greater student diversity);**

- ⇧ **20% increase in productivity (in both academic and administrative operations);**

- ⇧ **20% real increase (after inflation) in net income from sources other than government funds and student tuition.**

The UMS institutions must be the primary locus for change. Therefore, this plan challenges each UMS institution to develop its own responses to the overarching objective and the broad percentage goals according to strategies outlined below -- or to identify other courses of action that would be more appropriate and productive.

Since the percentage goals are for the System as a whole, a set of systemwide teams will develop recommendations for systemwide strategies to complement and supplement institutional efforts. These teams will be inter-institutional, inter-constituency and inter-disciplinary and will either be existing working groups with an expanded charge or newly constituted groups. The systemwide teams will focus on collaborative efforts that help meet the enrollment, productivity and new revenue goals. As a first step, the teams will be charged with determining appropriate benchmarks and measurements to assess progress.

The primary role of the Regents and the Chancellor in this planning process will be to monitor, facilitate, and reward institutional efforts to develop and implement strategies that meet the broad objectives; to foster collaboration among institutions; to ensure that statewide needs are being met; and to solicit widespread support for the UMS. The System leadership will annually devote at least 1% of total general fund revenues toward these ends.

The needs of students and the State must be the driving force in both institutional and systemwide planning. Therefore, System Administration will have an ongoing responsibility to identify those needs, to monitor trends, to analyze competitive pressures, and to scan the environment within and beyond Maryland's borders for information that strengthens the planning process through knowledge.

A STRONG FOUNDATION

The UMS must approach these challenges from a position of strength. Among the strengths it already possesses:

- the UMS is a family of distinctive and complementary institutions, each with its special set of strengths and each made stronger by its membership in the family.

- the UMS institutions currently provide a broad array of high quality educational programs and services to their students and their communities.

- the core mission of the UMS remains student learning in accord with the best traditions of a liberal education and the best practices in undergraduate, graduate and professional education.

- the UMS faculty and staff are deeply committed to advancing knowledge through research and scholarship and -- in keeping with strong land-grant and public service traditions -- to sharing their expertise with the larger community in fields such as agriculture, the environment, and health care.

- as a public university system, the UMS is dedicated to providing affordable, accessible, high quality educational opportunities; to advancing the State's economic development; to acting as a democratizing influence in society at large; to supporting the diversity of the State it serves; and to addressing major societal and public policy issues.

- the UMS remains committed to the ten propositions set forth in Vision I and the action plan initiated by Vision II.

- the UMS institutions have recently refined their mission statements, are already engaged in individual strategic planning efforts and systemwide accountability measures, and are actively involved in development of a four-year funding plan.

STRONG MEASURES

Given the challenges stated above, the UMS institutions must build on their present strengths, collaborative efforts, revenues, and use of information technology to change substantially by the year 2002. Listed below are guidelines for institutional responses in each of these strategic areas.

A Four-Part Strategy

The System can be strong only if its individual institutions are strong. Therefore, this planning effort must be rooted in the institutions themselves. Each UMS institution is called upon to develop a set of responses to the systemwide goals and to build on their mission statements and current planning efforts to address the following strategic areas:

❶ **Build on Institutional Strengths.** Each institution should identify the particular strengths on which it plans to build to position itself strategically for the 21st century and to enhance the quality of its services. Attention should be given to the tripartite mission of teaching, research/scholarship and service; to changing needs and demographics of key clienteles; as well as to the focus, image, and affective dimensions of the institution. In planning for the future, the institutions are encouraged to take innovative approaches to service delivery and organizational structure as well as maximizing the use of facilities. Institutions may also want to indicate impediments to the changes they envision and ways in which the other institutions and the leadership of the System might help them overcome those impediments.

The institution should address budget priorities by indicating areas in which it plans to invest available funds and areas from which funds can be redeployed. The institution should develop specific enrollment targets or scenarios for the year 2002 that acknowledge the projected growth in demand. The institution should suggest standards by which it wants its performance and productivity to be judged, emphasizing client-centered, outcome-based measures. Those standards should be tied to reward structures for faculty and staff and to systemwide accountability efforts.

❷ **Strengthen Institutional Collaboration.** As the UMS faces an increasingly competitive marketplace, it enjoys a strategic advantage in being a system. Through cooperation and collaboration, the UMS institutions can significantly expand educational opportunities, reduce unproductive duplication, and achieve economies of scale that institutions acting independently cannot match. Therefore, the institutions are called upon to identify additional opportunities for cooperation in the academic, administrative and advancement arenas.

The institutions should also plan for stronger partnerships external to the UMS. Each institution should seek to strengthen cooperation with other educational sectors (especially, K-12 and community colleges), state agencies, and private enterprise. Particular emphasis should be placed on collaborative efforts tied to the State's economic development.

❸ **Strengthen Institutional Revenues.** The UMS must seek revenue increases from both State and non-State sources. In identifying how they will increase non-State revenues, the institutions should provide specific information on plans for marketing their services to "paying customers." They should be highly entrepreneurial in seeking out new or underserved markets for education, training, information services, and technology transfer as well as in creating strategic alliances that offer a reliable income stream. They should address how they will maintain affordable tuition and how they will deal with the possibility of shrinking federal budgets for research and student financial aid. And they should establish clear strategies for increasing philanthropic support with the goal of doubling alumni gifts and endowment levels by 2002.

Institutional initiatives to enhance non-State revenues are not intended to offset declines in State general fund support. The System remains committed to seeking a higher State budget priority for higher education.

❹ **Strengthen Information Technology Infrastructure.** To achieve their goals, the UMS institutions must further exploit modern information technology. This technology not only can extend the institutions' distance learning capabilities and expand access for place-bound students, it also offers enormous potential for improving the efficiency and quality of both academic programs and administrative services. As the institutions plan their widening deployment of information technology, they should address the implications for faculty and staff development, for operating and capital budgets, and for cooperation with other institutions, within and outside the UMS.

System Administration should accelerate consultation with the institutions on ways in which systemwide collaboration and centralized services can enhance the efficiency and effectiveness of information technology. UMSA should also explore linkages between the UMS, other state agencies, and other educational sectors in the development and expansion of information networks.

STRONG STEPS

In preparing their responses, the institutions should seek brevity, clarity, elegant simplicity, realism and broad participation. At the same time, they should be innovative, entrepreneurial, and forward-looking. The planning effort will proceed on the following general timeline:

Fall 95: Institutions respond to goals and develop specific initiatives
Board Chairman and Chancellor meet with Presidents individually
UMSA provides necessary data and analyses
Chancellor provides initial charge to systemwide teams

Spring 96: Institutional plans are reviewed by Chancellor and Regents
Institutional plans are integrated with four-year funding plan

Summer 96: Systemwide teams make initial recommendations to Chancellor/Regents

The UMS and its institutions need not wait for completion of the planning process to move in the directions set forth in this document. They should begin immediately to position themselves to meet the broad goals. Moreover, ongoing efforts to develop the FY97 budget, the four-year funding plan and accountability reports will take these goals into account.

A STRONG MESSAGE

A bright future for the UMS and those it serves depends on strong support from the citizens of Maryland and their elected representatives in Annapolis. While this planning process stresses the need to increase non-governmental revenues, the UMS leadership will continue to call upon the State to make "the smart investment" in higher education by giving it higher priority than has heretofore been customary in Maryland. To secure adequate financial support in Annapolis and to increase statewide appreciation and utilization of their programs and services, the UMS institutions must embark upon a strategic communications effort that complements and reinforces the goals of their strategic planning. With widespread citizen support and through enthusiastic implementation of the strategies described above, the UMS can achieve its ambitious goals, transforming both itself and the State of Maryland.

A STRONG FUTURE

What if we succeed? The success of this planning effort will be measured against the following vision.

It is the year 2002; surveying the Maryland scene, we find that:

- The State of Maryland has weathered the storms of the nineties and is socially and economically vital. Its citizens share an unmatched quality of life in a healthy and beautiful physical environment supported by a strong knowledge-based economy.

- Maryland's economy depends on an increasingly well-educated citizenry; nearly a third of the state's citizens have college degrees, and a high proportion are engaged in some form of formal education at any given time.

- Maryland's education system is widely recognized as one of the nation's best and has become seamlessly integrated, top to bottom and end to end. Rarely is it perceived as composed of unrelated independent levels or segments; rather, it is often described as a PS-PR (for "pre-school through post-retirement") system. Maryland's citizens of all ages transfer almost effortlessly into and out of the system, and among its institutions and segments. This movement is facilitated for each person by an electronic "smart card" which carries the person's educational record, from pre-school through the undergraduate college transcript, faculty recommendations, artist's portfolio, and the complete Ph.D. thesis.

- Maryland's education system is accessible at any time of the day or night in every corner of the state, on traditional campuses, in schools, in workplaces, and in homes.

- The demographic characteristics of Maryland's students mirror those of its citizenry generally -- every group whether young or old, rich or poor, white or non-white, male or female, is comparably represented.

Looking to the University of Maryland System, we find that:

- The UMS institutions have diversified and specialized, but have linked themselves together in a true "system" that can provide the full range of academic programs and services to almost anyone, anywhere, anytime. This has been achieved by joining cooperation to competition in the operations of the System's institutions.

- In recognition of the UMS's key contributions to the State's economic and social health, Maryland's leaders have steadily raised the priority given to the State's investment in the UMS and its sister higher education institutions.

- In return, the UMS has increased its contributions to the State: It has contributed greatly to Maryland's nationally renowned reform of pre-college education. It has

become an integral part of the ongoing employee development of most Maryland businesses. It has provided the knowledge foundation of an increasing number of new Maryland businesses. Public and private policy makers regularly look to the UMS for advice and counsel.

- UMS faculty are in the midst of a pervasive and profound change in what they do and how they do it. The boundaries between academic disciplines and their organizational manifestations will be largely transparent. The complexity of the problems and issues that the academic enterprise finds itself addressing is reflected in the increased use of multi-individual, multi-disciplinary teams. In teaching, the faculty role is increasingly that of coach, mentor, and guide in a joint learning effort with students, and decreasingly that of purveyor of information. The focus of the faculty's relationship with students has shifted from teaching to learning. Research and service are viewed simply as different (and equally valuable) forms of learning.

- The UMS institutions have led in the national development of widely accepted academic and administrative productivity measures. In terms of these measures, the UMS has become substantially more efficient.

- While the UMS has benefited from steady (albeit modest) increases in State funding and has maintained competitive tuition levels in accordance with long-standing Regents' policy, it has successfully increased revenue from other sources. Despite uncertainties and instabilities in Federal funding for research and development, UMS institutions have increased their market share of available Federal funding by rapidly adapting to and more aggressively pursuing shifting Federal funding priorities. Private giving has increased markedly; both annual giving levels and endowments have doubled for most UMS institutions since 1995.

- Both the UMS institutions and the System as a whole are nationally recognized as higher education leaders. The State's flagship institution is considered by those in higher education to be among the nation's top ten public research universities. Well-informed citizens of Peoria and Anaheim are also aware of its eminence. Every other UMS institution is nationally known for particular strengths. Most important of all, the high regard in which Maryland's public universities are held outside Maryland is at long last shared by Marylanders themselves. Most Marylanders know how good their public universities are and are proud of them.

Approved by the Board of Regents
October 6, 1995